

The following article, from a past issue of *Customer Service Newsletter*, describes one phone company's efforts to "be proactive about retention."

— **Editor**  
***Customer Service Newsletter***  
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## Be proactive about retention: Satisfy customers coming and going

Holding onto customers in a highly competitive marketplace means taking care of customers during every phase of their relationship with your company. At Bell Atlantic NYNEX Mobile (BANM), that means filling service needs when customers sign up, when they experience problems with products or services, and when, in the worst-case scenario, they wish to end their relationship with BANM.

At BANM's regional office in Morristown, NJ, Adriana Preziosi, GM, Customer Care Special Teams, is working with her CS managers and reps to build a customer service program that proactively handles customer needs at all stages of the relationship. Two teams in particular — the Proactive Support Team and Loyalty Management Services — help to welcome new customers, reward loyal customers, and retain those who wish to end service.

### Be proactive about welcoming new customers

Formerly known as the Customer Care team (a name that was “too general,” says Preziosi), the Proactive Support Team has dual missions of being proactive and providing backup support to other customer service teams on an as-needed basis.

One very important initiative of the Proactive Support Team is welcome calls. “That’s the first thing the team did of a proactive nature,” says Preziosi.

Why welcome calls? “Our customer service teams get a lot of questions, rather than complaints,” says Sandy Handler, staff manager of training and development. “Customers call to ask ‘How do I dial? Where can I use the phone?’ We get questions about the bill because it is very different than a regular phone bill. We also get questions about the products we offer, the services, other pricing plans and offers, what services and pricing would suit the customer best, and then how they work.” The purpose of the welcome calls is to clear up some of these questions before customers need to call.

BANM does this by downloading information from its billing system to the Proactive Support Team reps' computers and screens. The information lists customers who were activated during the month; reps then make outbound calls — ideally within the first month of service — welcoming customers to Bell

Atlantic NYNEX Mobile and verifying certain pieces of information like the customers' pricing plan, telephone number, and address. “We then ask them if they have any questions, such as how to work certain features, we explain what different sounds signify, and help them to understand their first bills and cellular equipment in general,” says Preziosi.

(To download information onto the reps' screens, BANM uses an automated voice link or mosaic system, such as those used for telemarketing. The system will call customer phone numbers looking for a live voice; when one is found, the call rings to the rep's phone and the customer's information automatically pops up on screen. Without this technology, Preziosi says performing welcome calls would not be efficient or cost-effective.)

Besides welcome calls, the Proactive Support Team will also make anniversary calls. After one year with Bell Atlantic NYNEX Mobile, customers will receive a call from reps in which they will state, in essence: “You've been a valued customer for one year and we would like to thank you.” Reps will then make certain authorized offers to customers, such as additional prod-

### Special programs designed to satisfy customers — and keep them

Bell Atlantic NYNEX Mobile's customer service programs are part of its team approach to service through every stage of the customer's relationship with the company.

#### Loyalty Management Services

- Retention — specialists talk with disconnecting customers to discover why they are disconnecting and to make an effort to retain their business.

#### Proactive Support Team

- Welcome Calls — reps call new customers to “welcome” them by explaining equipment, services and billing, and answering questions.
- Anniversary Calls — reps call customers after one year of service to offer usage analyses, improved pricing (if needed), and additional services.
- Win-Back Program — reps call customers who have been disconnected with special offers.

ucts and services or performing an analysis to see if customers are on the best pricing plans to suit their usage. “We’ll also see if they are having problems and offer to remedy them; for example, if they are missing calls, reps might offer them voicemail,” says Preziosi. “It’s really meant as a thank-you for their loyalty.”

### **Keep an eye on possible defections**

Another new program proposed for the Proactive Support Team is the Win-Back program, in which reps would call customers who have disconnected with a predetermined (but somewhat flexible) offer.

Recently, the Proactive Support Team started another special project (on a trial basis). Reps are making outbound calls to customers who have suspended — not disconnected — their service because of vacations, car repairs, etc. “These suspensions could go on for a long time and obviously we don’t want that to happen, so we’re calling those who have been suspended for 30 to 90 days to see if we can entice them to reactivate their service,” Preziosi explains. “Sometimes you find out that they just forgot to reactivate service, or they actually had their phone stolen, etc.” Reps will be armed with special offers to help convince customers to reactivate.

### **Create a team of retention specialists**

Formerly known as the Retention Unit, the newly christened Loyalty Management Services still handles basic retention but is expanding to new, more proactive retention services. The new name, says Preziosi, “better describes the way we serve customers and the role we play in the Customer Service department. Our primary goal — to increase customer tenure and loyalty — is better reflected in our new name.”

Unlike the Proactive Support Team, Loyalty Management Services mostly takes inbound calls. When a frontline CSR gets a call requesting disconnection, the CSR connects that customer to Loyalty Management Services, telling the customer, “Let me connect you to someone who can better assist you with your request.”

When the Loyalty Management specialists take over the call, “they talk to the customer about why they want to disconnect, and how we can help them better,” says Preziosi. “The objective is to save the customer. There could be a million concerns that the customer could express — maybe they just don’t understand their bill. The specialist may only need to educate the customer

### **Develop teams for every customer process**

Because Bell Atlantic NYNEX Mobile is in the business of selling services and features, rather than equipment per se, it’s no wonder that its customer service teams are many and varied. Besides the Proactive Support Team and Loyalty Management Services, other customer service teams include: Customer Financials, which handles collections; a team that handles the activation process that deals with retail stores and sales reps to get customers on line; basic frontline CSRs who answer customers’ inquiries (“these can vary from billing to technical questions,” says BANM staff manager of training and development Sandy Handler); a technical support team; fraud; corporate accounts; and internal support groups that work interdepartmentally — behind the scenes.

about the equipment or the bill to retain them. If the issue is cost, the specialist can then check for a better pricing plan. It all depends on the issue.” Specialists can handle such complicated calls, says Preziosi, because they “are seasoned, and up to date on what BANM has to offer.”

Loyalty Management Services has also started a new initiative: the stolen-phone program. “In the past,” says Preziosi, “when a customer’s cellular phone was stolen, they would call the 800 number and talk to a regular CSR; that CSR would then suspend the account and give the customer 90 days to replace their equipment and give us a call to reconnect.”

Now, with new program, calls are transferred to Loyalty Management Services where the specialist offers to replace the equipment right over the phone. Customers are even given the opportunity to upgrade or change their equipment. Then, a drop shipment is issued from the warehouse and delivered to the customer within two business days. “This helps the customer in that they have a cellular phone again with minimal downtime. And it helps us because we have minimal downtime; we have eliminated the window of opportunity for the customer to go to a competitor’s shop to replace their phone and their phone service.” Preziosi points out that to “a lot of customers the thing that is most important is time; they don’t have time to go out and shop for a new phone.”

And Loyalty Management Services has crossed

briefly into the realm of the Proactive Support Team. Recently, the team obtained a manual report of customers in the Philadelphia area still on old pricing plans. "We did some outbound calls to the customers to offer new pricing plans because these customers were at a higher risk of being lost to competitors." Preziosi says the team has had moderate success with this project.

### **Turn seasoned reps into satisfaction specialists**

All these proactive and detail-oriented services sound very complicated. Where does Preziosi get reps who can handle the pressure?

"Ninety-nine percent of the Loyalty Management team are recruited from our 800-number team." Reps spend one, two, or three years as frontline CSRs and then are promoted into Loyalty Management as "specialists."

With the proactive support team, rep recruitment has been a little different. "We have reps both from the 800 line and from other areas," says Preziosi. "The first preference is to hire experienced reps from within, but if you don't have the resources you need to go elsewhere."

What special training do reps on each team get? After the six weeks of training that all reps receive, Loyalty Management specialists "have their own training." They need skill sets that focus more on "negotiating and listening for clues," says Preziosi. In order to hone these skills, new specialists sit one-on-one with

experienced Loyalty Management specialists, "listening to how they deal with customers and getting training on the guidelines for negotiation."

Proactive Support Team reps receive training on the Automated Customer Dialer and any other project they are working on. "Mostly they are customer service veterans who are well trained and quite cross-functional so that we can pull them to help out other teams that are short handed," says Preziosi. "This team is constantly flexing to meet the needs of the business," she says. "We're always looking at where we need them most, where we can get the most bang for the buck; it's a very flexible team."

Do the ideas for the new projects and programs come from Preziosi, her managers, or her reps? "They come from all of us," says Preziosi. "In Loyalty Management Services, the idea for the stolen-phone program came from the team and from the manager having the team look at how we could better serve our customers. The team and the manager brainstormed and then brought the idea to me to refine." Once refined, Preziosi can often implement programs without higher approval; other times she must send ideas further up the ladder depending on the proposed project's staffing and resource needs.

The Proactive Support Team also comes up with ideas and suggestions on how to proactively assist its customers. ■

## **Customer Service Newsletter**

A publication of The Customer Service Group

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